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MARCH 18, 1988

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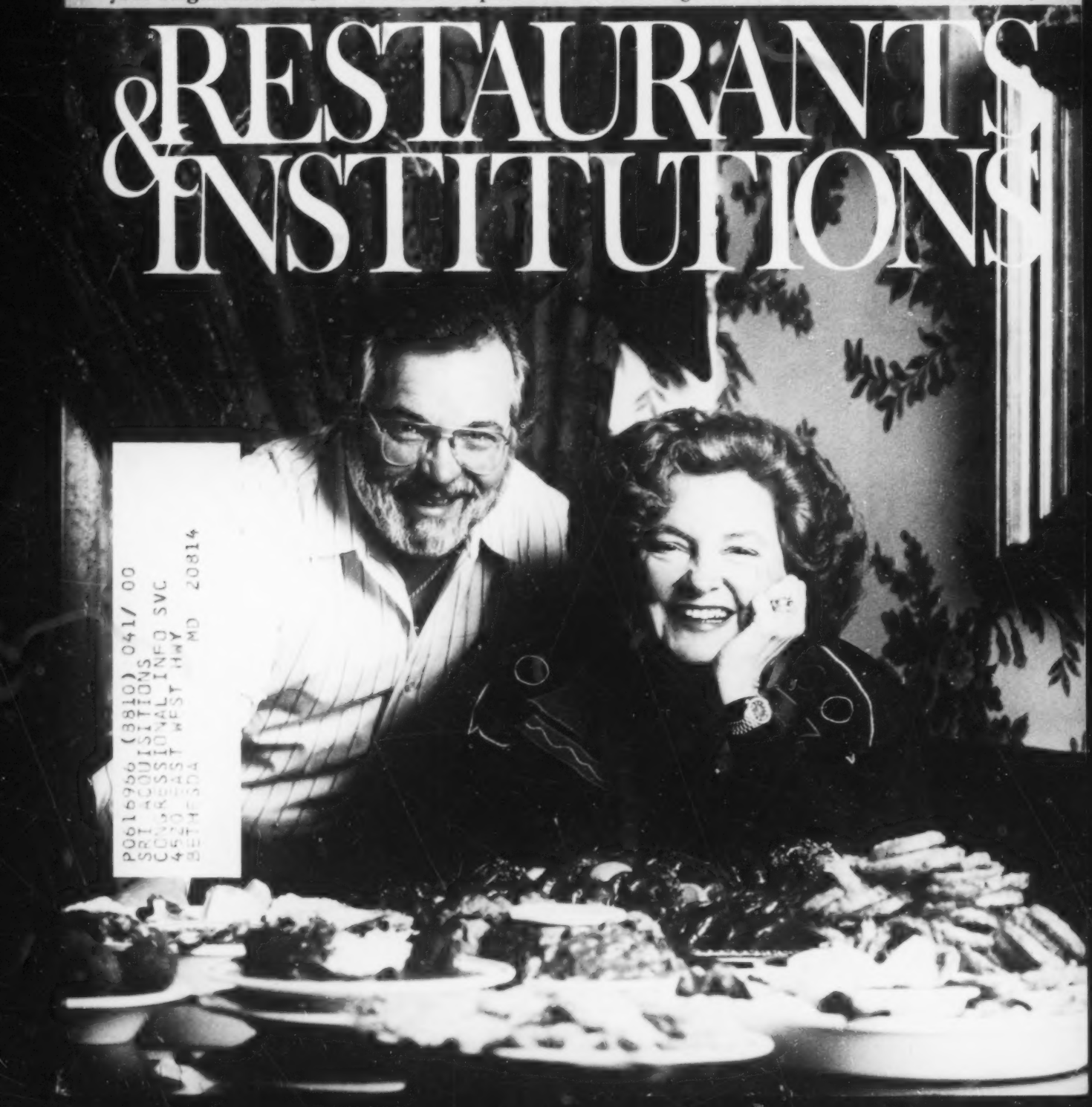
RESTAURANTS & INSTITUTIONS



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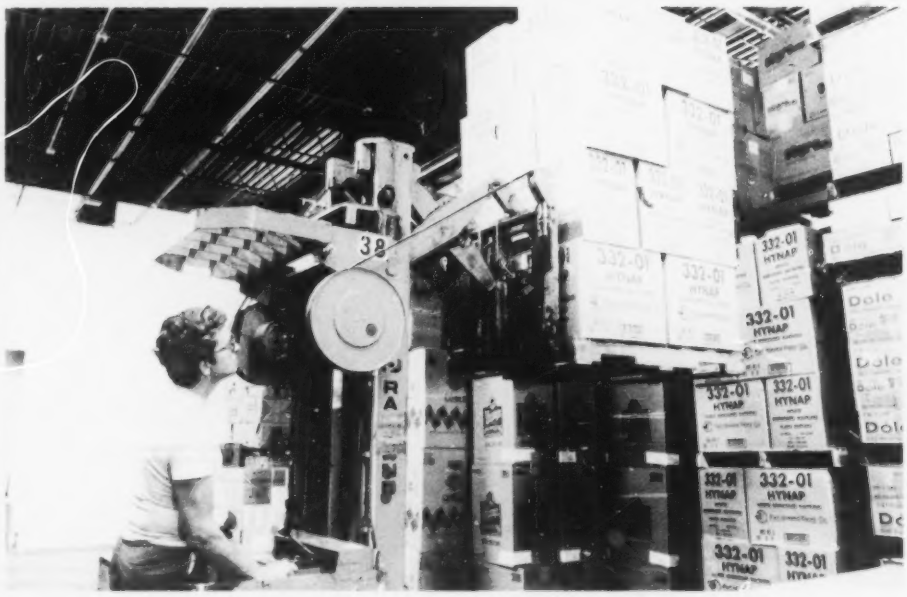


Distribution today is a weight-lifting contest operators will judge.

■ SUPPLIERS

Independents React to Giant Distributor Moves

Service, marketing and reach are the competitive goals driving today's supply system.

During the past three years, acquisition activity among foodservice distribution companies has raced along at a dramatic pace. Kraft Food Service Co. alone has purchased more than 20 small distributors since June 1985. Other major distributors such as PYA/Monarch, Sysco and Staley Continental also have been busy buying up small independents as they strive for purchasing clout and greater consistency in service and product across a region or the entire country.

"Consolidation is a reflection of a maturing industry," says Ron Paul, president of Technomics, a foodservice consulting firm. "It allows distributors to achieve some economic leverage and advantages that ultimately should be reflected in more efficient pricing to customers."

Numerous reasons have been cited as to what triggered the wave of acquisitions and mergers and created a new group of superdistributors.

"The industry is operating in a mature environment and there is pressure to gain greater productivity, buy better and market better, and the market is automatically thrown into a consolidation mode," says Mike Gray of Pocahontas Foods USA.

Some industry experts refer to the domino effect—once one company started buying, the others followed suit. Others say companies were taking advantage of acquisition tax incentives.

Another key factor in explaining the consolidation trend is the change in distributors' customer bases. Twenty years ago, there were only a few chain customers. Today, however, chains account for a much greater share of all foodservice purchases and have created the need for greater geographic distribution.

Peter Nordlund, marketing manager at Staley Continental's foodservice division, says this operator consolidation has placed increased demands on distributors. "Chains want consistency of product and services across a region or the country," says Nordlund. "Dealing with local distributors here, there and everywhere who don't have the computer services or purchasing clout does not allow them to obtain that consistency."

A random survey of foodservice operators conducted by the Cahners Bureau of Foodservice Research, an affiliate of *Restaurants & Institutions*, shows operators expect competitive pricing, merchandising support and brand selection to improve as a result of the recent mergers and acquisitions. Some operators feel understanding of the local market, personalized service and responsiveness to individual customer needs will slip.

In response to customer fears about service, Tully Rankin, vice president of business development for PYA/Monarch, says, "I have not noticed any drop in the level of service since consoli-

Superdistributors must maintain customer focus.

dation intensified.

"You can't afford to go back today," says Rankin. "Distributors know it is cheaper to do things right on the first call."

Others argue it is no longer profitable for large distributors to call on small independent operators. And while there is agreement that new opportunities may exist for warehouse clubs and the old "wagon jobber" distributor, the larger distributors say they will not forget about the "little guy."

"I don't think anyone has to worry," says Jim Lowery, executive vice president of finance and administration for Sysco. "Some of the smallest operators might have to consolidate purchases to make it profitable for us. When they do, they will get plenty of attention."

Rankin says, "The problem with a lot of customers is they enjoy buying from many different suppliers. They will have to narrow the number they can support . . . The independent will continue to have someone to sell to them."

While merger and acquisition activity is expected to continue, but at a slower pace, the trend does not spell the end for independent distributors. In fact, smaller distributors see potential for growth because they feel larger distributors are not effectively addressing the needs of the many small restaurant operations. The industry is beginning to see a second tier of distributors filling the void. In 1987, the fastest growing independents increased their sales nearly 25%.

"Our objective is to continue to develop unique service levels," says Steve Thoms, vice president of systems design for Thoms Proestler Co. of Davenport, Iowa. "We want to do the types of things that further separate us from the large suppliers."

Small- and medium-sized distributors also need to learn new ways to stay competitive with services offered by the giants. Group affiliations, which help lower the costs of providing state-of-the-art services, are growing in popularity.

To match the purchasing clout and affordability of marketing services of the large corporate distributors, buying groups such as ComSource Independent Foodservice Companies Inc. have organized. ComSource is the result of the merger of Nifda Inc. and North American Foodservice Cos. Inc. Designed to service the independent operator, the coalition of 135 independently owned distributors now represents the largest foodservice distribution group in the world, representing almost $6 billion (7%) in sales to the industry. ComSource will provide a very strong financial base, allowing for aggressive expansion of purchasing programs and a cafeteria plan of selected marketing services.

"Our involvement is primarily with the supplier community and with services to keep our member distributors more competitive," says ComSource President Shannon Talley. "We will be doing more consolidated procurement, taking positions on product and actually buying products in blocks."

With corporate distributors driving hard toward capturing a larger share of the market, Gray and Talley expect more independents to affiliate with distributor groups. —*Jeff Weinstein*

Distributors are busy updating communication systems.

HOW OPERATORS VIEW DISTRIBUTOR CONSOLIDATION TREND

The results of an October 1987 telephone survey of restaurant operators who deal with distributors that have been involved with mergers and acquisitions show the majority feel the consolidation trend will have a positive impact on the foodservice industry.

	Number	Percent
A positive development	29	50.0%
A negative development	20	34.5%
No effect	9	15.5%

Source: North American Foodservice Companies Inc.

INDEPENDENT GROUPS COMPETE AND GROW

By consolidating forces under the banners such as ComSource, independent and investor group-owned distributors hope to keep up with technology and find better ways to lower operating costs. In order to maintain a competitive posture for their customers, members can pick and choose marketing services that fit their needs without paying for another member's program.

R&I EXCLUSIVE

■ COVER STORY

AMERICA'S TOP 100 INDEPENDENTS

By Julie Mautner

Clifton's Brookdale Cafeteria in Los Angeles has 737 seats and a decor meant to evoke the North Woods—beams that look like redwood tree trunks and a small splashing stream in the dining room. The two top menu items are fried chicken and roast turkey, and no liquor is served. The restaurant has a check average of just $3.40.

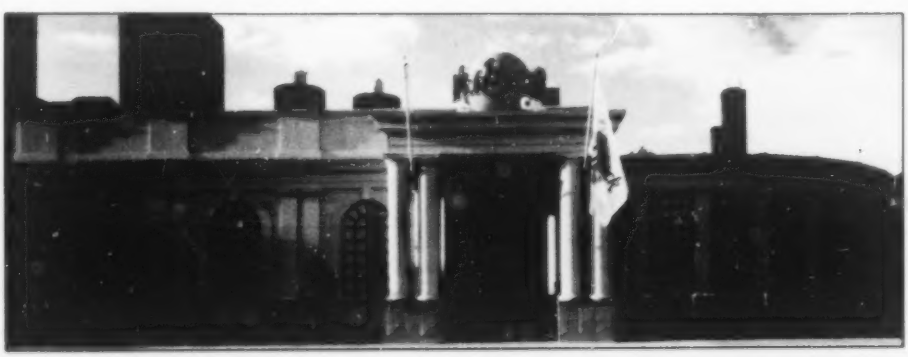
The Quilted Giraffe in New York has 85 seats, four stars from *The New York Times* and a dinner check average of $135 per person—which makes it almost 40 times as expensive as Clifton's. Caviar and smoked salmon top the list of best-selling items, and the wine list includes bottles priced to $450.

East is East and West is West, but these two restaurants *do* meet, their conceptual and coastal opposition bridged by a kindred spirit: the proprietors' passion for excellence and the dedication necessary to achieve it. It is this spirit that *R&I* set out to capture five years ago when we began ranking Top Independents, and it is this spirit to which we dedicate the following 11 pages.

As in years past, the top 100 restaurants are ranked by their 1987 food and beverage sales; revenues from gift shops, cover charges and room rentals are not included. Each restaurateur provides a sales figure and is responsible for its accuracy. In cases where no figures are supplied, *R&I* estimates sales and indicates these estimates with an asterisk.

To qualify as an independent, an operator may own no more than 10 restaurants, and we've listed each by his most successful concept. Restaurants located in areas with built-in customer traffic—theme parks such as EPCOT, casinos, airports and large hotels—have been disqualified while operators who lease space in small hotels or who offer lodging as well as dining, have not. Each restaurant on our list is at least one year old, open prior to January 1987.

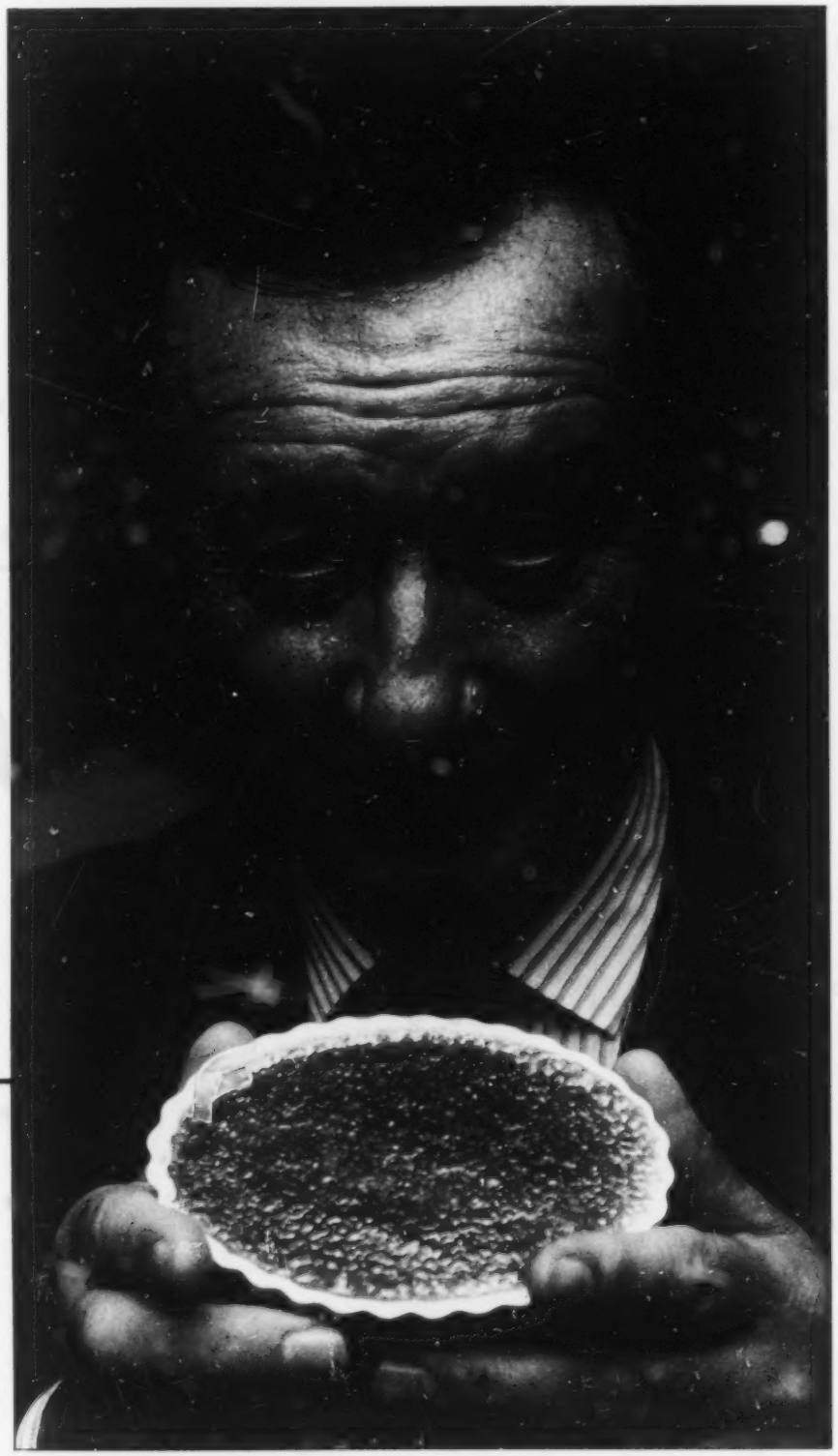
Among this year's Top Independents, you'll find a few operators who've made headlines in the past 12 months, among them Marshall Cogan (who closed The '21' Club for 14 weeks and



Peter Morton's Hard Rock Cafe (Chicago) rang up 1987 food and beverage sales of $7.2 million, and another $3.2 million in T-shirts, sweatshirts and the like. Morton opened two Hard Rocks in 1987—New Orleans and Honolulu—bringing his total to seven. He also owns the upscale Morton's in Los Angeles.

reopened with a new look and two award-winning chefs) and Frank Giuffrida (who will soon start expanding his successful Hilltop Steak House concept). You'll find many familiar faces and some new names as well; you'll find restaurateurs in their 80s and some in their early 20s. You'll find brothers and sisters, mothers and daughters, in-laws, cousins and friends—and you'll find some of America's finest restaurateurs.

Join us on the following pages as we toast the Top 100 Independents for 1988.



It's called The Circus, but this genteel, 125-seat Manhattan restaurant is anything but. At Le Cirque, proprietor Sirio Maccioni, who began in the business at age 14, plays host to the city's most powerful and prosperous patrons, offering impeccable service and the finest French food. His Crème Brûlée, voilà!

THE TOP 100

Rank	'87 rank	Restaurant/city/owner	Sales	Opened	Seats	People served/year
1	1	**The Hilltop Steak House** Saugus, Mass. Frank Giuffrida	$30.5MM*	1951	1,300	2,350,000*
2	2	**Tavern on the Green** New York, N.Y. Warner LeRoy	25.5	1976	1,197	620,000
3	6	**The '21' Club** New York, N.Y. Knoll Int'l Holdings (Marshall Cogan)	15.1**	1923	500	180,000*
4	3	**Phillips Harborplace** Baltimore, Md. Brice, Shirley, Steven & Olivia Phillips; Paul Wall	15.0	1982	700	540,000*
5	4	**Anthony's Pier 4** Boston, Mass. Anthony Athanas & Family	14.6	1963	650*	600,000
6	5	**Smith & Wollensky** New York, N.Y. Alan Stillman	14.5	1977	400	307,000
7	8	**The Manor** West Orange, N.J. Harry Knowles & Family	14.1**	1957	1,500	400,000
8	—	**The Four Seasons** New York, N.Y. Paul Kovi & Tom Margittai	14.0	1959	400	187,800*
9	14	**Zehnders of Frankenmuth** Frankenmuth, Mich. Edwin L. Zehnder	13.0	1856	1,300	1,025,114
10	7	**Spenger's Fish Grotto** Berkeley, Calif. Frank L. Spenger & Frank Spenger Jr.	11.9	1890	700	912,500
11	10	**Old San Francisco Steakhouse** Dallas, Texas Henry Reed & Partners	11.1*	1974	750	504,000*
12	—	**Scoma's Restaurant** San Francisco, Calif. Al Scoma	10.9	1965	235	507,918
13	17	**The Russian Tea Room** New York, N.Y. Faith Stewart-Gordon	10.5	1926	325	300,000
14	—	**Shooter's on the Water** Fort Lauderdale, Fla. Reg Moreau, Al Lahaye, Mel Burge & Rolly Maranda	10.5	1982	360	620,500
15	13	**The Water Club** New York, N.Y. Michael D. O'Keeffe	10.5	1982	250	140,000*
16	12	**Old Original Bookbinders** Philadelphia, Pa. John & Albert Taxin	10.3**	1865	800	264,000
17	15	**The Kapok Tree** Clearwater, Fla. Aaron R. Fodiman & Murray Steinfeld	10.2	1957	1,750	857,370
18	—	**Le Cirque** New York, N.Y. Sirio Maccioni	10.0*	1974	125	117,375*
19	—	**Jimmy's Harborside** Boston, Mass. Charles J. Doulos	9.5	1924	460	346,510
20	11	**The Hard Rock Cafe** New York, N.Y. Hard Rock International PC (Issac Tigrett)	9.2	1984	250	711,209
21	9	**Legal Sea Foods** Boston, Mass. (Boylston St.) The Berkowitz Family	8.9**	1975	329	363,000
22	18	**Haussner's Restaurant** Baltimore, Md. The Haussner Family	8.9*	1926	880	600,000*
23	38	**Joe's Stone Crab** Miami Beach, Fla. The Sawitz & Weiss Families	8.6†	1913	380	331,000
24	—	**Ditka's** Chicago, Ill. Mike Ditka, Jerry Vainisi, G. Shlaes & E. Pontillo	8.5	1986	160	189,000*
25	16	**Yesterday's** Fort Lauderdale, Fla. Peter Goldhahn	8.3**	1975	650	340,000*

* *R&I* estimate ** owner estimate † open only seven months ©1988 *Restaurants & Institutions*, a Cahners publication

&RESTAURANTS INSTITUTIONS

Rank	'87 rank	Restaurant/city/owner	Sales	Opened	Seats	People served/year
26	—	**Gallagher's Steak House** New York, N.Y. Jerome Brody	$8.2MM	1937	240	290,000*
27	19	**The Rascal House** Miami Beach, Fla. Norman & Steve Stamler, Arthur Goodman	8.2	1954	425	1,724,250
28	20	**Mai-K** ort Lauderdale, Fla. Robert F. Thornton	8.1	1956	475	230,000
29	22	**The Berghoff** Chicago, Ill. Herman Berghoff & Family	8.0	1898	700	900,000
30	21	**Columbia Restaurant** Tampa, Fla. Cesar Gonzmart & Family	7.7	1905	1,660	515,350*
31	32	**Montgomery Inn-Ribs King** Cincinnati, Ohio Ted Gregory Family	7.7	1951	384	725,000**
32	23	**Frankenmuth Bavarian Inn** Frankenmuth, Mich. William Zehnder Jr. & Family	7.6	1888	1,200	800,000
33	—	**The Hard Rock Cafe** Chicago, Ill. Peter Morton	7.2	1986	250	727,000
34	—	**Space Needle Restaurant** Seattle, Wash. The Howard S. Wright Family	7.2	1962	220	355,000
35	33	**Ralph & Kacoo's** New Orleans, La. James R.(Ralph) & Catherine (Kacoo) Olinde	7.1	1983	790	397,000
36	44	**Chinn's Crab House** Wheeling, Ill. Robert Chinn & Marilyn Chinn	7.0	1983	425	390,828
37	29	**The Lobster House** Cape May, N.J. Wallace Laudeman	7.0	1940	280	462,000
38	25	**Sardi's** New York, N.Y. S. Lichtenstein, I. Bloch, H. Klaris & L. Lowenthal	7.0	1921	350	350,000
39	57	**The Commissary** Philadelphia, Pa. Steven Poses	7.0**	1977	100	720,000
40	31	**Longhi's** Lahaina, Hawaii Robert & Peter Longhi	6.9	1976	220	365,000
41	27	**Gibby's Steaks and Seafood** Fort Lauderdale, Fla. Donald, Steven & Eric Hersh	6.8	1978	600	400,000
42	36	**Leona's** Chicago, Ill. The Toia Family	6.8	1950	400	920,000
43	—	**The Old Ebbitt Grill** Washington, D.C. Stuart Davidson & John Laytham	6.8	1856	350	400,000
44	52	**The Union Oyster House** Boston, Mass. Joseph, Mary Ann & Mary Milano	6.8**	1826	620	550,000
45	28	**The Cliff House** San Francisco, Calif. Dan, Mary & John Hountalas	6.8*	1850	301	340,000
46	41	**Mike Fink** Covington, Ky. Benjamin L. Bernstein	6.6	1968	410	261,500
47	—	**John Dominis Restaurant** Honolulu, Hawaii D.G. Anderson	6.5	1979	370	141,304
48	48	**The Angus Barn** Raleigh, N.C. Thad & Alice Eure	6.2	1960	550	221,360
49	34	**15th Street Fisheries** Fort Lauderdale, Fla. Michael Hurst	6.2	1979	250	196,446
50	39	**Rustic Inn Crabhouse** Fort Lauderdale, Fla. Henry J. Oreal, Wayne McDonald & Wayne Oreal	6.2	1956	525	328,000

THE TOP 100

Rank	'87 rank	Restaurant/city/owner	Sales	Opened	Seats	People served/year
51	40	**The Omega Pancake House** Niles, Ill. George Stavropoulos & Partners	$6.1MM	1984	400	1,000,000
52	49	**The Pacific Dining Car** Los Angeles, Calif. Wesley A. Idol II	6.1	1921	185	255,600
53	35	**Kowloon** Saugus, Mass. William & Madeline Wong	6.0	1960	1,200	1,095,000*
54	46	**Twin Oaks** Cranston, R.I. William De Angelus Jr.	6.0	1933	550	518,150
55	62	**Bern's Steak House** Tampa, Fla. Bern & Gert Laxer	6.0**	1956	320	200,000
56	66	**Stars** San Francisco, Calif. Jeremiah Tower	6.0**	1984	150	125,000
57	37	**Joe Muer's Restaurant** Detroit, Mich. Joe, Thomas & William Muer	6.0*	1929	420	290,000*
58	30	**Junior's Restaurant** West Los Angeles, Calif. Marvin & Bette Saul	5.9	1959	238	728,000
59	—	**Shorebird Beach Broiler** Honolulu, Hawaii John R. McManus	5.8	1978	400	360,000
60	43	**Tangier Restaurant** Akron, Ohio Edward J. George	5.8	1954	1,800	200,000
61	50	**The Chateau Restaurant** Waltham, Mass. Louis J. Nocera & Marianne Skerry	5.6	1953	800	700,000
62	—	**The Quilted Giraffe** New York, N.Y. Barry & Susan Wine	5.6	1975	85	46,000
63	55	**Scott's Jack London Seafood** Oakland, Calif. M. Stroud, M. Newman & R. Gallagher	5.6	1984	450	225,000
64	56	**Barrett's on Boston Harbor** Boston, Mass. Frank Barrett, Richard Barrett & Mary Costello	5.5	1985	225	260,000
65	77	**Harris Ranch** Coalinga, Calif. John C. Harris	5.5	1977	535	646,074
66	47	**O'Shea's Wharf** Marco Island, Fla. Thomas & Dolores Shea	5.5	1976	650	325,000
67	45	**The Ritz** Newport Beach, Calif. Hans & Charlene Prager	5.5	1977	250	150,000
68	—	**Clifton's Brookdale Cafeteria** Los Angeles, Calif. Donald H. Clinton & Jean C. Roeschlaub	5.4	1934	737	1,518,352
69	58	**Pal's Cabin** West Orange, N.J. W. Donald Horn & Family	5.3	1932	400	500,000
70	—	**DiMillo's Floating Restaurant** Portland, Maine Tony DiMillo	5.2	1954	800	330,000*
71	53	**Knicker's** Des Plaines, Ill. Nicholas Mitchell	5.2	1982	1,250	331,850
72	—	**Tobacco Company Restaurant** Richmond, Va. Dr. Jerald D. Cable	5.2	1977	220	235,000
73	63	**Bishop's Restaurant** Lawrence, Mass. Victoria, Charles, Abraham & Joseph Bashara	5.1	1949	530	300,000
74	69	**Café des Artistes** New York, N.Y. George Lang	5.1	1915	107	130,000
75	54	**The Nut Tree** Nut Tree, Calif. Edwin Power, Robert Power & Mary Helen Fairchild	5.0	1921	379	675,000

* *R&I* estimate ** owner estimate † open only seven months ©1988 *Restaurants & Institutions*, a Cahners publication

RESTAURANTS & INSTITUTIONS

Rank	'87 rank	Restaurant/city/owner	Sales	Opened	Seats	People served/year
76	68	**Carson's, The Place for Ribs** Chicago, Ill. (Wells St.) The Carson Family	$5.0MM	1978	170	275,000
77	72	**Joe's Pier 52** New York, N.Y. Jane Smith & Cynthia Kipness	5.0	1967	185	148,000
78	—	**The Melrose Diner** Philadelphia, Pa. Richard W. Kubach & Richard Kubach Jr.	5.0	1935	106	1,089,000
79	59	**The Rattlesnake Club** Denver, Colo. Michael McCarty & Jimmy Schmidt	5.0	1985	500	180,000
80	60	**Spago** West Hollywood, Calif. Wolfgang Puck & Barbara Lazaroff	5.0	1982	160	126,500
81	61	**Christ Cella** New York, N.Y. Richard T. Cella	5.0*	1926	290	130,000
82	—	**Figlio** Minneapolis, Minn. P. Roberts, G. Jones, D. Hays & P. Mihajlov	4.9	1984	220	373,625
83	98	**Gotham Bar & Grill** New York, N.Y. J. Kretchmer, R. Rathe, R. Rathe & J. Bliss	4.9	1984	140	105,500
84	74	**The Pirate's House** Savannah, Ga. Sander Hollander	4.9	1953	429	275,000
85	—	**Chez Josef** Agawam, Mass. Allan Skole	4.8	1969	1,400	167,200
86	90	**Christo's Restaurant** Brockton, Mass. Chris G. Tsaganis	4.8	1964	550	612,000
87	96	**F. McLintock's** Shell Beach, Calif. Bruce Breault & Tunny Ortali	4.8	1973	350	324,442
88	75	**Warehouse Restaurant** Marina del Rey, Calif. Burt Hixson	4.8	1967	400	225,000
89	—	**Bay Tower Room** Boston, Mass. Bay Tower Inc.	4.8**	1978	360	117,522
90	65	**Sea Watch Restaurant** Fort Lauderdale, Fla. James Edmondson	4.8**	1973	250	300,000
91	—	**Le Bernardin** New York, N.Y. Gilbert & Maguy LeCoze	4.8*	1986	120	92,400*
92	64	**Maxwell's Plum** San Francisco, Calif. Maxwell's International Inc.	4.7	1981	600	191,076
93	67	**Pittypat's Porch** Atlanta, Ga. Tony & Stanya Anthony	4.7	1967	300	190,000
94	81	**Seafood Shack Restaurant** Cortez, Fla. Ham Jones	4.7	1972	700	360,000
95	—	**Trail Dust Steak House** Dallas, Texas The Parker Family & Roger Pock	4.7	1977	600	371,600
96	76	**Dominique's** Washington, D.C. Dominique D'Ermo, Henry Prati & Sandra Servator	4.6	1974	200	185,000
97	70	**The Smoke House** Burbank, Calif. Lee Spencer & Pat Heaney	4.6	1946	439	361,721
98	78	**Weber's Restaurant** Ann Arbor, Mich. Herman E. Weber	4.6	1937	350	225,419
99	—	**Jesse's Landing** Seminole, Fla. Richard Johnson, Kelley Johnson & Dan Simmons	4.5	1986	415	449,265
100	73	**Pilgreen's** Morrow, Ga. Rip & Geneva Gold *continued on page 54*	4.5	1983	500	280,000**

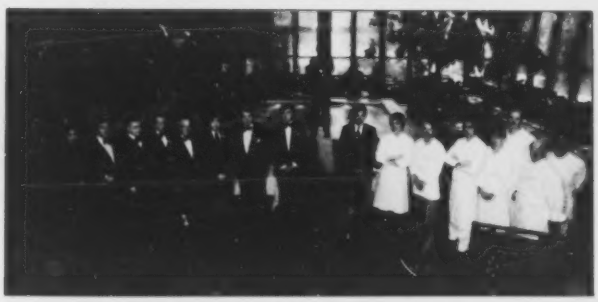
THE TOP 100

continued from page 47

INDEPENDENT FACES AND PLACES

FISHFUL THINKING
When Gilbert LeCoze was a boy in Brittany, he fished on his grandfather's trawler and spent summers working in the family's restaurant. Today, he and his sister Maguy run the four-star Le Bernardin, an elegant seafood restaurant in Manhattan's Equitable Center. With just 120 seats, the LeCozes have received as many as 1,500 reservation requests in one day; for a table on Saturday, plan to wait a month.

NOT-SO-AVERAGE CHECKS
The Rascal House has one of the lowest dinner check averages ($5.65), while The Four Seasons has one of the highest—upwards of $80. The Rascal House serves more people in a day than The Four Seasons does in a week.



GIRAFFE MIGRATION △
In July 1987, Barry and Susan Wine closed the doors of their Second Avenue restaurant and moved the four-star Quilted Giraffe into the site previously occupied by their *other* restaurant, the Casual Quilted Giraffe. The Wines also added lunch (four days a week), dinner on Saturday and 25 seats, increasing sales from less than $3 million in 1986 to $5.6 million this year.

FACTS & FIGURES
Tangier is the largest independent with seats for 1,800; The Quilted Giraffe, the smallest, with seats for just 85. The Hilltop serves approximately 2.35 million people a year, while The Quilted Giraffe serves just 46,000. The Hilltop's retail store does an estimated $19.5 million in sales!

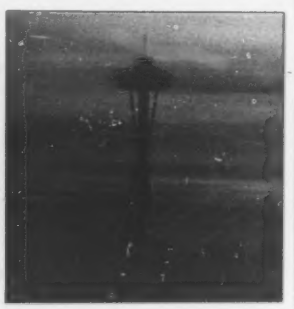
WASHINGTON ATE HERE
The Union Oyster House is the oldest independent: It opened in Boston under the name Atwood & Bacon in 1826. The Cliff House first opened in San Francisco in 1850. Zehnders of Frankenmuth opened in 1856, as did the Old Ebbitt Grill, which is generally considered Washington, D.C.'s oldest saloon.

RESTAURANTS & INSTITUTIONS

HAIL COLUMBIA!
When Casimiro Hernandez Sr. opened the Columbia restaurant in Tampa, Fla., in 1905 it had just 60 seats; today it has 1,600 and is the largest Spanish restaurant in the world. The family empire is now run by Casimiro's granddaughter Adela Gonzmart and her husband Cesar (pictured), and their sons Richard and Casey. Last month, the Gonzmarts opened two new concepts in Tampa—Columbia Express and Cha Cha Coconuts; in June, they will open 45,000 square feet of restaurant and bar space on The Pier in St. Petersburg, Fla. Orlando is next—they'll open there in 1989. The goal? "Thirty restaurants within five years," Richard reports.

DAYS OF NO WINE AND MELROSE
Open seven days a week, 24 hours a day, the Melrose Diner has been a Philadelphia institution for more than 53 years. Offering high-quality food at reasonable prices, owners Richard W. Kubach and Richard Kubach Jr. serve an average of 3,000 people a day. The Melrose serves no liquor and yet sales total $5 million.

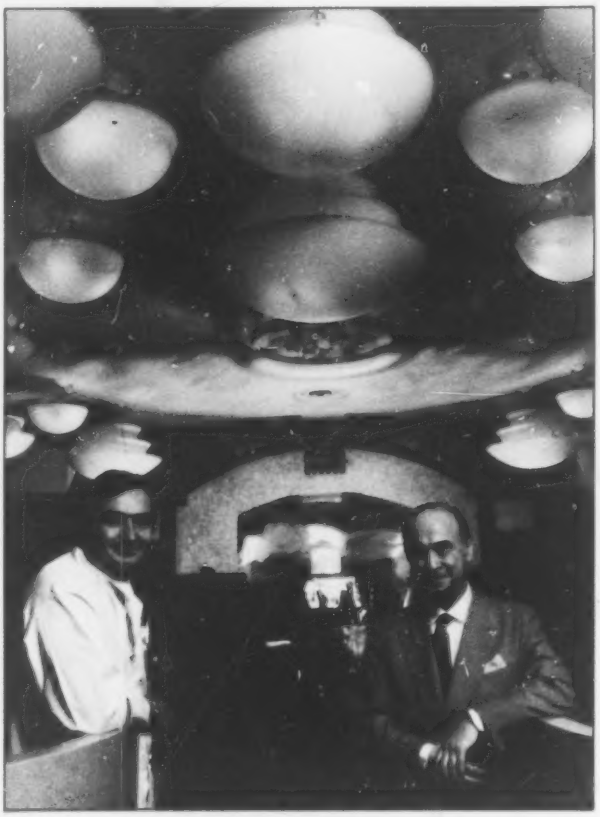
PROUD NEW DADDY'S
Thad Eure Jr.—of The Angus Barn—and his partner John Vick have opened their third Fat Daddy's Market and Grill, this one in Fayetteville, N.C. Fat Daddy's is a self-service burger and salad bar concept. Other Top Independents who have moved into the quick-service segment: the Wongs of Kowloon and Ted Gregory of the Montgomery Inn.



LUCKY STARS
For someone who never really wanted to be a chef (he has a master's degree in architecture from Harvard), Jeremiah Tower has done just fine. In December, he unveiled Stars' new room for private parties and he plans to continue expanding, adding a cafe and store for retail and takeout.

LOCATION, LOCATION, LOCATION
Perched at the 500-foot level of Seattle's most famous landmark, the Space Needle Restaurant revolves once every hour offering patrons spectacular views of Puget Sound and the Cascade Mountains. Two other great locations: Mike Fink and DiMillo's, both located on permanently moored boats.

THE TOP 100



Chef Gerard Pangaud and co-owner Joe Baum at Aurora

TWENTY-FIVE TOP CONTENDERS

Who just missed this year's cutoff of $4.5 million? Here are the 25 restaurants that would have come next. Last year's rank appears in parentheses where applicable.

101. Nick's Fishmarket, Chicago, $4.49
102. Castagnola's, San Francisco, $4.45
103. The Hampshire House, Boston, $4.41 (#87)
104. Cricket's, Chicago, $4.40 (#79)
105. Tony's, Houston, $4.40 (#51)
106. Phillipe, The Original, Los Angeles, $4.38
107. Arne's Fine Seafood, Boston, $4.35 (#92)
108. Atchafalaya Cafe, Houston, $4.30**
109. The Coach and Six, Atlanta, $4.25** (#82)
110. Arni's, Lafayette, Ind., $4.20
111. Fraunces Tavern, New York, $4.20 (#86)
112. The Ginger Man, New York, $4.15
113. Las Casuelas Terazza, Palm Springs, Calif., $4.10 (#99)
114. Aurora, New York, $4.10** (#84)
115. Casa Rillo, Camp Hill, Pa., $4.08
116. Harpoon Hannas, Fenwick Island, Del., $4.07
117. Dan'l Webster Inn, Sandwich, Mass., $4.06 (#91)
118. London Chop House, Detroit, $4.03 (#85)
119. Bookbinder's Seafood House, Philadelphia, $4.0 (#88)
120. The Down Under, Fort Lauderdale, Fla., $4.0 (#97)
121. El Cholo, Los Angeles, $4.0 (#89)
122. Union Square Cafe, New York, $4.0
123. Lutece, New York, $4.0*
124. Grady's Goodtimes, Knoxville, Tenn., $3.97
125. The Waterfront, San Francisco, $3.95

* *R&I* estimate ** owner estimate

MULTIPLICATION TABLES

When asked if they had plans to open additional restaurants, more than one-fourth of all the Top Independents said yes.

On the East Coast, the **Athanas Family** (Anthony's Pier 4) has begun a major development on Boston's waterfront. The $1.1 billion project will include commercial, residential and office space, as well as a public marina and two hotels . . .

Stillman

Schmidt

Michael O'Keeffe (The Water Club) will open a restaurant called LauraBelle in New York sometime this month . . . **Alan Stillman** (Smith & Wollensky) will open another restaurant in New York late this year, most likely a high-end steakhouse . . . **John and Albert Taxin** (Old Original Bookbinders) will open a 285-seat restaurant in **Donald Trump's** Taj Mahal Casino complex in Atlantic City, N.J., this fall.

In the South, **Aaron Fodiman** and **Murray Steinfeld** will open a Kapok Tree in Nashville, Tenn., in April 1989. This will be their first restaurant outside of Florida . . . **Thad** and **Alice Eure** (The Angus Barn) will open a Fat Daddy's Market and Grill in Greensboro, N.C., and another in Greenville, N.C. . . . **Richard Johnson, Kelley Johnson** and **Dan Simmons,** who own and operate Jesse's Landing, will open a restaurant in Dunedin, Fla., this month.

In the West, **Peter Morton** will open a Hard Rock Cafe in San Diego in late summer, and another in Sydney, Australia, in fall . . . **John McManus** (Shorebird Beach Broiler) will open two restaurants in Honolulu this year . . . **Jimmy Schmidt** and **Michael McCarty** will open a Rattlesnake Club in Detroit in May . . . **Ralph** and **Kacoo Olinde** will open in Dallas in April.

In the Midwest, **Ted Gregory** (Montgomery Inn-Ribs King) will open a restaurant

Morton

Berghoff

on the river in Cincinnati in June . . . **Benjamin Bernstein** (Mike Fink) will open a restaurant in Cincinnati this summer and one in Covington, Ky., next summer . . . **Nicholas Mitchell** (Knicker's) says he plans to open a restaurant in downtown Chicago sometime this year . . . **Herman Berghoff** (The Berghoff) and his family are busy trying to find the right location for a small Chicago brewpub.

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THE TOP 100

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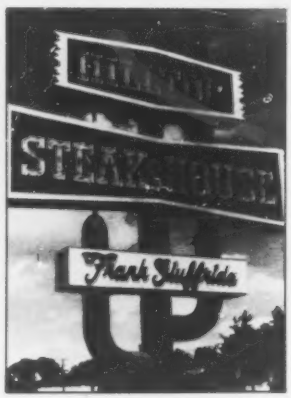

KING OF THE HILL

This is the fifth year that *R&I* has ranked America's largest restaurants and the fifth year that the Hilltop Steak House came in first.

1988
1. The Hilltop Steak House
2. Tavern on the Green
3. Phillips Harborplace
4. Anthony's Pier 4
5. Smith & Wollensky

1987
1. The Hilltop Steak House
2. Tavern on the Green
3. Phillips Harborplace
4. Anthony's Pier 4
5. Smith & Wollensky

1986
1. The Hilltop Steak House
2. Tavern on the Green
3. Phillips Harborplace
4. Anthony's Pier 4
5. Smith & Wollensky

1985
1. The Hilltop Steak House
2. Tavern on the Green
3. Anthony's Pier 4
4. Spenger's Fish Grotto
5. Phillips Harborplace

1984
1. The Hilltop Steak House
2. Tavern on the Green
3. The '21' Club
4. Spenger's Fish Grotto
5. The Manor

SECRETS OF SUCCESS

To what do our Top Independents attribute their success? We asked, and this is what they told us:

Herman Berghoff, The Berghoff: "Keeping the best of the old traditions while adding the new."

Bruce Breault, F. McLintock's: " . . . We have tenaciously clung to the idea of serving each customer as if he were our only customer."

Tony DiMillo Sr., DiMillo's Floating Restaurant: "I worked my tail off for 30 years, day and night. Now my five sons don't have to put in long hours in this very hard business."

Charles Doulos, Jimmy's Harborside: "A standard of excellence in quality, service and consistency, a friendly ambiance, employee loyalty, lots of regular customers and terrific food."

Frank Giuffrida, The Hilltop Steak House: "Consistency, quality, quantity and service, all at affordable prices."

Marilyn Glennon, Christo's: "Owner Chris Tsaganis works seven days and nights a week . . . "

Arthur Goodman, The Rascal House: "We're family-owned . . . and constantly family-supervised . . . "

Ted Gregory, Montgomery Inn-Ribs King: "Quality control, large portions, quick service. You might wait one to two hours, but as soon as you're seated, food starts appearing in seconds. Plus, we have the greatest ribs anywhere."

W. Donald Horn, Pal's Cabin: "Family supervision at all times, quality foods only, friendly atmosphere, well-trained and supervised employees."

Bern Laxer, Bern's Steak House: "We try to bring people back, whatever it takes . . . "

Stuart Lichtenstein, Sardi's: "Tradition, tradition, tradition. Location, location, location."

Bob Longhi, Longhi's: "We have the freshest, best ingredients from all over the world, such as fresh asparagus and raspberries 12 months a year. Our people are trained to treat the customer the way they want to be treated. Our goal is to be the best restaurant in the world, and Maui is the best spot in the world."

Joseph Milano, The Union Oyster House: " . . . All our customers are VIPS . . . "

Jim Rittenberg, Ditka's: Location, promotion, name recognition and quality. Our food is good, our service is good, and we get lots of players and celebrities in here, and that's a big attraction."

Charles Doulos, Jimmy's Harborside

Bob Longhi, Longhi's

JoAnn Sawitz, Joe's Stone Crab: "We run this restaurant as a family. No employee is asked to do a job that family would not do, from peeling shrimp to cleaning bathrooms. There is a definite camaraderie here, a family feeling. We care about each other as people."

Allan Skole, Chez Joseph: "Consistency, attention to small details, excellent food, good service and beautiful amenities."

Faith Stewart-Gordon, The Russian Tea Room: "Luck and patience."

Barry Wine, The Quilted Giraffe: "Hard work, and the team effort of our staff."

Edwin Zehnder, Zehnder's of Frankenmuth: "Having good financial control, quality food, fair prices and being family-operated."

William F. Zehnder, Frankenmuth Bavarian Inn: "A family commitment to quality. We're progressive, willing to take a chance . . . "

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THE TOP 100

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LAST YEAR'S GREAT EXPECTATIONS

Last year, we ran a list of new restaurants expected to make our list this year. Here is a brief rundown of those restaurants and what happened to them in 1987.

Jesse's Landing, Seminole, Fla. Opened in March 1986, Jesse's Landing did $4.5 million in sales this year, making it No. 99 on our list. Located in a large Victorian home on a bayou, the restaurant specializes in fresh seafood dishes such as blackened grouper and chargrilled snapper.

Ralph & Kacoo's, Baton Rouge, La. Owners Ralph and Kacoo Olinde predicted that their newest restaurant, opened in June 1986, would do $6.5 million in sales its first year. The restaurant had an extremely successful 12 months, and sales totaled $6.3 million, just slightly less than the largest Ralph & Kacoo's unit located in New Orleans.

Le Bernardin, New York. An intimate, 120-seat restaurant opened in January 1986, Le Bernardin is now considered by many to be the city's finest spot for seafood. Brother and sister Gilbert and Maguy LeCoze run the restaurant together, serving a *prix-fixe* lunch ($35) and dinner ($60) to an average of 300 people a day. *R&I* estimated Le Bernardin's 1987 sales at $4.8 million, making it No. 91 on the list.

Potomac - on - the - River, Washington, D.C. Potomac's owner Warner LeRoy predicted first-year sales of more than $10 million at his opulent new restaurant on the edge of Georgetown, and the restaurant did in fact come close to that goal, achieving first-year sales of just under $10 million. Just 15 months after Potomac opened, however, LeRoy filed for bankruptcy protection under Chapter 11 and closed the restaurant due to what a company spokesman calls "an unworkable relationship with the landlord stemming from overcharges and unfulfilled commitments."

Jesse's Landing

The Cadillac Bar, New York. Opened in July 1986 by Ken Newman, along with Gregg and Carol Wallace, the Cadillac was expected to gross more than $5 million its first year. Traffic has slowed considerably since Year No. 1, when the restaurant was serving an average of 600 people a day, but the Cadillac nevertheless reported 1987 sales of $3.8 million. In December 1987, Newman bought out his partners and is now the sole owner of the three Cadillac Bars—New York, Houston and Dallas.

Twenty-Twenty, New York. Since opening in June 1986, this restaurant and nightclub, owned by the musical duo Ashford and Simpson, has undergone a number of major changes: new staff, new chef, new menu and a new partner, Brad Johnson. Sales totaled just less than $3 million this year.

GREAT EXPECTATIONS

Below is a list of some restaurants opened since Jan. 1, 1987, that are likely to make our list next year.

Atchafalaya Cafe, Addison and Arlington, Texas. Richard Tannenbaum has taken his successful Cajun-Creole concept out of Houston (where sales were an estimated $4.3 million this year) and moved into the Dallas market with two suburban restaurants. The Addison unit, opened in May 1987, is projecting first-year sales of $5 million to $5.5 million. The Arlington unit, opened in December 1987, is projecting first-year sales of $4.5 million. Next, Tannenbaum hopes to expand outside of Texas.

Bice

Bellini by Cipriani, New York. Arrigo Cipriani, whose family owns Harry's Bar in Venice, opened this new restaurant in the theater district in June 1987. With lunch checks averaging $45 and dinner checks $55, the owner is predicting first-year sales of $6.5 million.

Bice, New York. The New York outpost of this fashionable Milan restaurant has been the toast of the town since its July 12 opening, serving an average of 200 lunches and 400 dinners a day. With lunch checks averaging $35 and dinner checks $45, owner Roberto Ruggeri is projecting first-year sales of $8 million to $10 million.

Il Palazzo, New York. Brothers Arnold and Bruce Zimberg are projecting first-year sales of more than $5 million at their 200-seat Italian restaurant opened in April 1987.

Shooter's on the Water, Cleveland. Opened in June 1987, Shooter's achieved $6 million in sales its first six months! With inside seating for 450 and room for another 180 outside, the Shooter's concept of casual dining on the water has been a hit in Florida and is every bit as successful up north. In summer, Shooter's caters heavily to pleasure boaters, who take advantage of 550 feet of dock space, and sun lovers, who come to eat and drink by Shooter's 20-by-20-foot pool. Management is projecting first-year sales of $11 million to $12 million.

Il Palazzo

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THE TOP 100

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STRENGTH IN NUMBERS
Many Top Independents own and operate more than one successful concept. Below are some that have three or more restaurants in addition to the one listed in our ranking. An approximate sales figure (in millions) is included where available.

Anthony Athanas and Family
Anthony's Hawthorne, Lynn, Mass.
Hawthorne by the Sea,
Swampscott, Mass.
General Glover House,
Marblehead, Mass.
Anthony's Cummaquid,
Yarmouthport, Mass.

Al Scoma
Scoma's, Sausalito, Calif., $1.6
Scoma's, Larkspur, Calif., $1.4
Scoma's of San Francisco,
Palm Springs, Calif., $1.5

Michael O'Keeffe
The River Cafe, Brooklyn, N.Y., $5.0
Cafe at Grand Central,
New York, $1.2
Bowden Square, Southampton,
N.Y., $.7

Peter Morton
Hard Rock Cafe, Honolulu, $9.8**
Hard Rock Cafe, Los Angeles, $9.4
Hard Rock Cafe, San Francisco, $9.3
Hard Rock Cafe, Houston, $5.1
Hard Rock Cafe, New Orleans, $6.5**
Morton's, Los Angeles, $1.9

The Berkowitz Family
Legal Sea Foods, Boston
(Park Plaza I), $8.6
Legal Sea Foods,
Cambridge, Mass., $8.5
Legal Sea Foods,
Burlington, Mass., $5.2
Legal Sea Foods,
Woucester, Mass., $4.0
Legal Sea Foods, Boston

Marc, George and Roger Berkowitz

(Park Plaza II), $3.8
Legal Sea Foods, Boston
(Chestnut Hill), $3.5
Legal Sea Foods, Logan Airport,
Boston, $0.8
Legal Lobster (wholesale) Allston,
Mass., $5.7**
Legal Sea Foods Market (retail)
Allston, Mass., $0.55

R. Moreau, A. Lahaye, M. Burge & R. Maranda
Shooter's, Cleveland, $9-$10**
Shooter's, Miami, $8.0
Shooter's, Boynton Beach, Fla., $6.0
Bootlegger's, Fort Lauderdale, Fla.

Cesar Gonzmart & Family
Columbia, Sarasota, Fla., $7.3
Columbia, St. Augustine, Fla., $3.6
Columbia, Tampa, Fla., $1.6
Columbia Express, Tampa, Fla.

Ralph & Kacoo Olinde
Ralph & Kacoo's (Bluebonnet)
Baton Rouge, La., $6.3
Ralph & Kacoo's, Bossier City,
La., $3.7
Ralph & Kacoo's, Baton Rouge,
La., $3.3
Ralph & Kacoo's, Metairie,
La., $3.3

Thad and Alice Eure
42nd St. Oyster Bar,
Raleigh, N.C., $3.6**
Fat Daddy's, Raleigh, N.C., $2.0
Fat Daddy's, Raleigh, N.C., $1.7
Fat Daddy's, Fayetteville, N.C., $1.6**

William and Madeline Wong
Maui Restaurant, Brockton,
Mass., $1.8
Wong's Fast Food, Burlington,
Mass., $0.6
Wong's Fast Food, Danvers, Mass.,
$0.6
Wong's Fast Food, Boston

P. Roberts, G. Jones, D. Hays and P. Mihajlov
The Good Earth (3 Minneapolis
locations) $1.6 each
Pronto Ristorante, Minneapolis, $2.0
Blue Point Fresh Seafood, Wayzata,
Minn., $2.0
Muffuletta, St. Paul, Minn., $1.0
Palm Court Deli, Edina, Minn., $1.0

Donald Clinton & Jean Roeschlaub
Clifton's Greenery, West Covina,
Calif., $1.9

Thad Eure

Clifton's, Lakewood, Calif., $2.1
Clifton's, Laguna Hills, Calif., $1.3
Clifton's, Whittier, Calif., $1.3
Clifton's Silver Spoon,
Los Angeles, $1.2

John R. McManus
John Richards, Honolulu, $1.3
Pieces of Eight, Honolulu, $1.7
Lewers St. Annex, Honolalu, $1.0
Lewers St. Fish Co., Honolulu, $1.5**

Frank & Richard Barrett; Mary Costello
Edmund Fitzgerald, Quincy,
Mass., $4.0
The Whitman, Farmington,
Conn., $3.0
Teels Cabin, Abington, Mass., $2.5
The New Gazelle, Quincy, Mass., $2.0
Charlie Horse, Kingston, Mass., $1.5
Amelia's, Quincy, Mass., $1.2

Malcolm Stroud & Martin Newman
Scott's Embarcadero Center,
San Francisco, $4.3
Scott's Lombard, San Francisco, $3.4
Scott's, Palo Alto, Calif., $2.3
Scott's Carriage House,
San Francisco, $1.6
Scott's, San Jose, Calif., $2.3

Stuart Davidson & John Laytham
Clyde's of Tysons Corners, Vienna,
Va., $5.7
The 1789, The Tombs, F. Scott's,
Washington, D.C., $5.7
Clyde's of Georgetown, Washington,
D.C., $3.9
Clyde's, Columbia, Md., $3.7

R. Pock, N. Parker II, N. Parker III, D. Parker, D. Parker, N. Parker Mark
Trail Dust, Mesquite, Texas
Trail Dust, Aubrey, Texas
Trail Dust, South Denver, Colo.
Trail Dust, North Denver, Colo.

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THE TOP 100

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A GOLDEN ANNIVERSARY

In 1987, Herman Weber celebrated an important anniversary—50 years in the restaurant business.

In 1937, at the age of 22, he and his brother leased an Ann Arbor, Mich., gas station for $40 a month and were allowed to open a small restaurant there as long as they agreed to keep pumping Hi-Speed gas. The Hi-Speed Inn consisted of a single room with 40 seats, a grill and a jukebox,—"that helped pay the rent"—and a hand-lettered menu that read "Hamburgers—15 cents. 12 oz. of Fresh Beer—10 cents."

Two more restaurants followed—one of them a cinderblock building just 32 feet by 40 feet—before Weber built at his present location in 1963. Today, he, his wife Sonja and their children Kenneth Weber and Linda Weber Fox run the family business, which consists of the 350-seat Weber's Restaurant and a 160-room luxury hotel called Weber's Inn, which was added in 1969.

Herman Weber

ALL IN A YEAR'S WORK

Husband and wife Wolfgang Puck and Barbara Lazaroff have had a busy year since they appeared on the cover of last year's Top Independents issue (*R&I* 3/4/87). In addition to running their two restaurants, Spago and Chinois-on-Main, they:

- organized and sponsored the Fifth Annual American Wine and Food Festival to benefit the Los Angeles chapters of Meals on Wheels. This year's event featured 15 chefs and 45 wine makers, and was held at Universal Studios. More than 1,100 people paid $150 each to attend.
- released a 63-minute, $29.98 video called "Spago: Cooking with Wolfgang Puck." Lazaroff designed the sets and wrote all the scripts; *People* magazine praised the video, proclaiming that "just *watching* Wolfgang can be delicious."
- rolled out a line of frozen pizzas for retail sale under the label Spago's Original California Pizza. There are three varieties: Four Cheese, Spicy Chicken, and Sausage with Herbs.
- added three more varieties to the Wolfgang Puck Presents line of frozen desserts: Strawberry Truffles, Triple Chocolate Mousse and Mini Apple Tarts.

Puck also has been busy working on a casual brewery and restaurant concept that will open in West Los Angeles sometime this year. (He is a partner but won't be actively involved.) And the next Lazaroff-Puck collaboration? "A baby," Barbara reports.

Puck and Lazaroff

ON THE COVER

Ralph and Kacoo Olinde were childhood friends in New Roads, La., and they opened their first restaurant in 1969. Today they have five units in Louisiana, with combined sales of $24 million, and another unit opening in Dallas next month. They live in Baton Rouge, La., and also own a working ranch in Mississippi. The Olindes have two daughters, one of whom does all the company's in-house artwork. Kacoo's nickname was bestowed upon her by a young niece who could not pronounce "Catherine."

The Olindes

The Olindes have built their reputation on high-quality Cajun-style seafood, reasonable prices and gracious service. "We wait to move into new markets until we're sure we're ready," Kacoo says, "and we spend an enormous amount of time and effort on food quality. If we weren't proud of it, we wouldn't serve it. Another thing we do is show lots of care and concern for the restaurants and for the people who work with us."

Faith Stewart-Gordon

A WOMAN'S PLACE IS . . .

Among the Top Independents there are two women who own and operate restaurants alone, without husbands, without partners.

Faith Stewart-Gordon inherited The Russian Tea Room when her husband passed away in 1967 and has actively managed it since. Her daughter joined the business early this year. She says she has been tempted to sell at many times, but resisted because "it was always a challenge and I couldn't stand the idea of admitting defeat. And this restaurant has always been a great comfort to me."

JoAnn Sawitz's grandfather opened Joe's Stone Crab in 1913. She was raised in an apartment above the restaurant and began working at age 11. Today her children Stephen Sawitz and Jodi Hershey work with her. Do employees treat Sawitz differenty because she's female? "People treat me not as a boss but as a friend," she replies. "That's how I want it to be, and that's how my father was before me." R&I

ACTION EXPRESS

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